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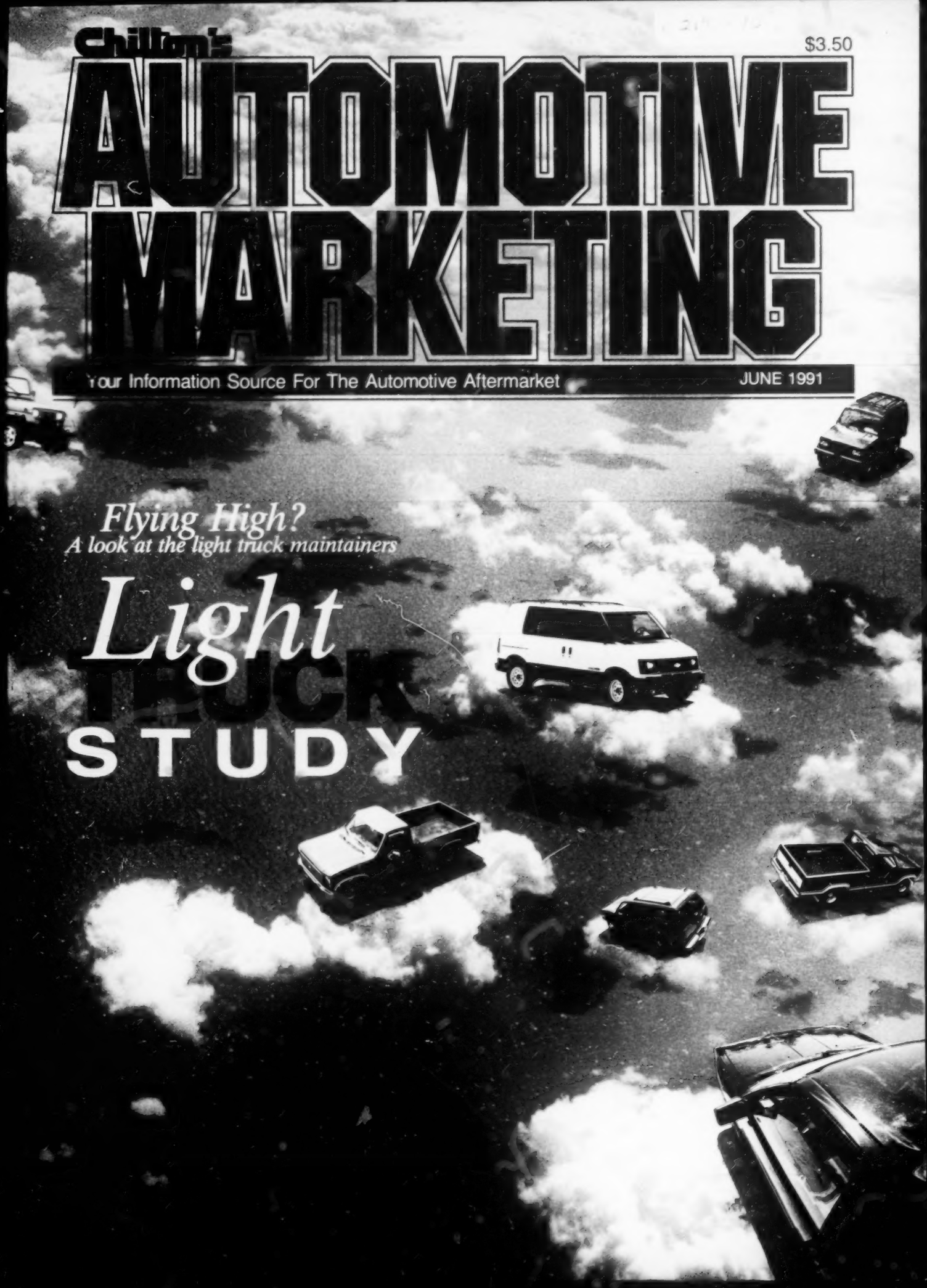

Flying High?
A look at the light truck maintainers

Light TRUCK STUDY

Chilton's
AUTOMOTIVE MARKETING

JUNE ISSUE/VOLUME 20, NUMBER 6

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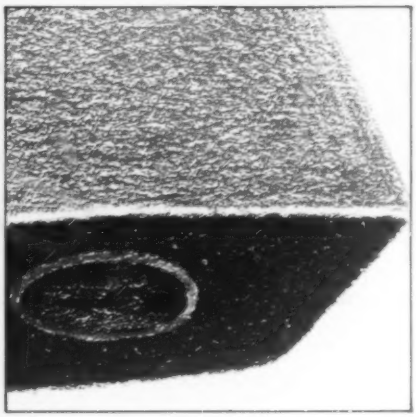

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JESSE H. NEAL AWARD-WINNING PUBLICATION FIVE OUT OF EIGHT YEARS

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MARKET LINE

Wax Market Shows Slow Growth But Competition Quickens

Last year, Chuck Tornabene, president, consumer products, Turtle Wax, Chicago, told us, "What you're going to see happen is smaller manufacturers' brands will fall by the wayside in the next few years. The field is going to narrow down."

While no brands fell out of the market in 1990, the share of market controlled by the leaders increased slightly. Four companies—Turtle Wax; Reed Union (Nu Finish), Chicago; Armor All, Aliso Veijo, CA; and First Brands (Simoniz), Danbury, CT—control some 80-85% of the market. And, indications are, they will continue to increase their shares.

Size And Shape

How big is the market? Last year we put wax sales in the $160 million to $180 million range. The market leaders found that still an acceptable range. Turtle Wax's Tornabene said, "It's $160 million to $180 million, it continues about the same. We're projecting a 2-3% increase in 1991. We've been tracking the number of people waxing cars for quite some time and it's been hanging around 45%. No increase or no decrease."

At Armor All, Paul Jones, director of marketing for the Wax Division, said, "It's $168 million for 1990. It was up slightly in 1990, in dollars. Unit sales were flat. Some 53% reported waxing their car."

Reed Union product manager Steve Hopkins simply shrugged. "We all rely on what we read. $160 million might be possible. The size of the market is not a major point with us. We're interested in our own numbers. The market is very flat, but the year was extremely good for us."

There are four good reasons for slow wax market growth: First, the heavy wax user tends to be a blue-collar male under 35 who's a parent with young children. The under 35 category is a shrinking demographic category as is the blue collar catgeory. Second, more and more women are car owners, and women tend not to be DIY waxers, which leads into the third reason: a growing use of professional car wash and waxing. And the fourth reason is an increasing number of clear coat finishes on cars on the road. Many consumers feel, or are told by new car salesmen, that clear coat finishes don't need to be waxed regularly.

With a flat market and eight or ten companies competing for market share, calling the market intensely competitive is understating the degree of competition.

Over the past several years first Armor All, then Nu Finish, have made dramatic entrances into the market, displacing other companies. Although Turtle Wax remains the market leader, Armor All and Nu Finish came from almost nothing to battle for number one.

WHERE WAX AND POLISH PRODUCTS ARE SOLD

According to suppliers, discount stores remain the major outlet for wax and polish. However, auto stores are increasing their share of this market.

Outlet	% Of Sales
Discount Stores	40-45%
Auto Stores	30-35
Grocery Stores	10-15
Drug Stores	10-15
Hardware Stores	5-10
Jobber Retailers	1-5
Others	1-5

Source: *Automotive Marketing* estimates from various industry sources

Armor All

Armor All built on the success of its protectant which still holds close to 90% of the protectant market. And, the company spent well over $5 million advertising its new wax. And just to be sure, Armor All bought Rain Dance, from Borden in 1988.

While Rain Dance is still the big dollar seller, Armor All wax fell from its initial high ranking in 1990. Jones conceded the company is not happy. "Of course we're not satisfied, our stated purpose is to be number one. Right now, three companies are vying to be number one. We have different plans for Armor All wax. We're very happy it stabilized at 6-8% of the market. In its introductory year, it peaked at 18%. But a lot of that was experimentalism."

Jones said the company will continue to run a three brand strategy: Rain Dance, Armor All, and Rally. "People buy different brands for different reasons. Some buy because they've always used it, some out of habit. Others buy the most durable, others buy what's on special. Rain Dance is the most durable, Armor All has our brand heritage, and Rally is strictly for price—it's a good solid, cheap wax. The largest part of our ad program will go on protectant. We have plans in place to state the position of Rain Dance as the longest lasting wax."

Nu Finish

Nu Finish benefited from a rave review in *Consumer Reports* and improved distribution. Hopkins said the success of Nu Finish is based on quality. "We have delivered what we claimed. We said the product will last a certain amount of time and it does. A company wouldn't be able to survive unless it gets repeat business, and we can get repeat business. Anybody can get business once with advertising. Armor All did that and really died with it. We're a simple company with a good product. People buy it a second time. People are tired of puffery. There are a lot of claims made for car waxes and not carried through. You see people pour

lighter fluid on cars and burn the finish. Such claims do a lot of harm to the industry. The consumer realizes it's just not true.

"Every year we've had increases in sales," Hopkins said. "We're the only wax company that can say that. The basis of our sales is so simple. We know where we were going from day one. There's no elaborate strategy. We have five SKUs. We produce a good product and present it at a reasonable price. We treat all retailers the same."

Turtle Wax

Discussing the challengers, Turtle Wax's Tornabene said, "The primary reason for their success is that a fairly large percentage of consumers like to try new things. I think people try it, then historically they come back to tried and true brands. Nu Finish finally got distribution, but up to two years ago they were only sold in drug stores. Last year they got all the brand switchers like Armor All did two years ago"

Turtle Wax still has the best selling wax and probably the widest line in the market. "Strategically, we try and compete with ourselves," Tornabene said. "Last year we introduced Liquid Crystal Super Premium. It was extremely successful and we got behind it with ads and end caps. At the APAA we introduced Finish 2001 and all early reports are very positive. It contains Urethene which the OEs are adding to paint to protect against environmental fallout like acid rain, road tar, and bird droppings. Obviously, we're supporting our number one Super Hard Shell, which has a lot of loyal customers. We certainly believe in niche marketing. People wax for different reasons."

Tornabene said Turtle Wax's most serious problem was simply out of stocks on retail shelves. "It's because there are not enough facings for Turtle Wax," Tornabene said. "Retailers need to provide more facings for the top selling brands. Don't carry duplicates. Go with the leaders."

Simoniz

Mark Haglund, director of marketing for the Automotive Products Division at First Brands (Simoniz), knows the company has a pretty tough road to hoe to gain market share. "It's not a fast growing market. It took a dip in the 1980s but it's coming back. It's not a big business, and it's segmented so you can't justify spending the bucks. Armor All spent five million and couldn't make it happen."

Simoniz will be coming in with a good, better, best lineup of Super Blue, an everyday wax, Simoniz Non-Abrasive for the midrange, and Simoniz Ultimate car wax at the premium end.

"We'll also take a stab at a niche with Simoniz Detailer's Choice," Haglund said. "Our research shows that people are well aware of detail shops but most people can't afford or are not willing to pay to use them. So we surveyed detailers to see what wax they use. What are their quality standards. Most won't name a brand, but will tell you the formula. They like high silicone waxes that're not too abrasive. Our labs say their waxes have a high silicone base. There are two kinds: some silicones go on easy and some make it last. Shine and durablility. From our research we developed Detailer's Choice and we'll sell it for under $10."

Still In The Running

While these four brands dominate the market, we also checked with three long time suppliers. Mike Moshontz, president of Blue Coral, Cleveland, said his company was 16% ahead of last year. "I attribute that to not coming out with a slew of new products. Look at the *Consumer Reports* article of two years ago where Nu Finish did so well. Of all the waxes, they chose to rate 30 varieties. Of the 30, seven were ours. Blue Poly was number two rated. Blue Poly Paste was the number one paste wax rated. Shame on me for not blowing our horn.

"What hurts the market is the proliferation of new products that have no technical validation: What do they do that older products don't do? This year, all our brands will be promoted." Blue Coral markets four brands: Blue Poly, Blue Coral, Westley's, and TR-3. "Our problem is, rather than put our logo on everything, we've chosen to have variety. It's the Proctor and Gamble theory. Tide is big, P&G is secondary. People miss the overall impact of corporate. There's not anybody in appearance chemicals doing any more business than Blue Coral.

The trend toward more sales through auto stores will help Meguiar's, Irvine, CA. Marketing manager Joan Carbrey explained, "We're bigger in auto stores where our target consumer shops." Meguiar's target consumer is not so much a matter of demographics as pyschographics. "It's how you approach your car," Carbrey said. "It's not just people who own expensive cars either. It's people who take care of the car because they love it. We're looking for the DIY consumer who's into taking care of his car and has a lot of pride in ownership. There are people who wax monthly; it a source of recreation and pleasure to them."

For this reason, Meguiar's main thrust is with its Deep Crystal System, a three step program of cleaner, polish, and wax. "Polish and wax are really different products," Carbrey said. "The cleaner is for oxidation, the polish is just designed to deepen and enhance the finish, and the wax is for long lasting protection." Meguiar's also has a "mainstream" one-step car cleaner and wax.

And finally, we spoke with Pat Cirelli, vice president and general manager of Mother's Polish, Huntington Beach, CA, which has always been regarded as a serious car waxers wax. "The key to our success is no matter whether the market is up, down, changing, or skewed, you can pick up Mother's and nothing is better. Others are good or as good, but nothing is better. We have top quality. We've after the Brooks Brothers customer, not the Salvation Army shopper."

Cirelli said the key is shelf placement since two-thirds of wax purchases are impulse buys. And getting into discount stores. He concedes it's easier to reach auto stores that are willing to try new brands or already know Mother's. Still, the key to success remains weekend weather. "I don't care what Michelob says," Cirelli said with a smile, "Weekends are made for wax and polish. People don't wax on Tuesdays. The number one influence on the market is the weather. People walk in the store and say, 'it's a nice day, I think I'll throw a wax job on the car.' And you have to be on the shelf that day." ■

KAUFMAN ON THE MARKET

Competition Hotter Among Service Retailers For Undercar Business

By Edward L. Kaufman,
Contributing Editor

It seems as if all at once every service-oriented retailer in the aftermarket has decided to target the undercar service market. For example:

- Volume retailers are showing increasing interest in brake jobs, replacing shocks and struts, wheel balancing and wheel alignment.
- Specialists are becoming less specialized. Muffler specialists, are expanding their shock/strut replacement and brake jobs. Some brake and front end

specialists are showing interest in replacing catalytic converters, a business likely to increase because of more stringent emissions control standards and mandatory inspection. And, some tune-up/diagnostic specialists, like Sparks Computerized Car Care Centers, are edging into undercar service.

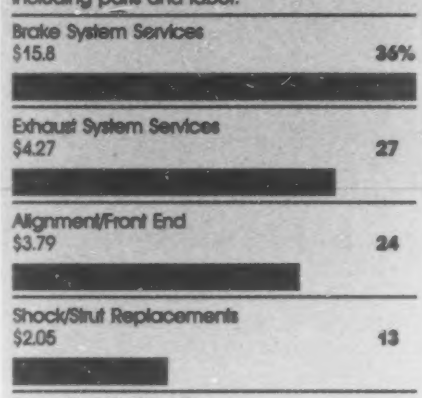
- Car dealers, gas stations, and independent repair shops remain important in brake service, wheel services, and only slightly less important in shock/strut replacement. Dealers of imported vehicles are particularly successful.
- Tire stores dominate the market for wheel balancing and wheel alignment services. Tire retailers are continuing to push for more automotive service revenue such as brake services and shock/strut replacement.

What's the attraction? Why is everybody getting into this act, and everybody else's act? There are three big reasons:

- A large and growing market. Total 1990 retail sales of undercar services (not including wheel balancing) were about $25.91 billion. Sales are going up because of more complex systems and costlier components. For example, the movement to four wheel drive vehicles has increased the average cost of brake repairs, not to mention costlier non-asbestos friction materials. The movement to front wheel drive vehicles requires costlier equipment and skilled technicians for wheel alignment. Also, MacPherson struts are more difficult for DIYers than ordinary shocks.

THE UNDERCAR SERVICE MARKET: 1990

Estimated retail sales in billions of dollars, including parts and labor.*



Source: Unsey-Kaufman Co.
* Does not include wheel balancing

- A relatively low barrier to market entry. Compared to numerous other categories of automotive service, you don't need the brain power of a rocket scientist to change mufflers, shock absorbers or brake pads. Many types of automotive retailers can afford the required investments in service equipment and technician training.
- Relatively high profits. Relative, that is, to services which might take longer to perform or be harder to estimate, like engine diagnostics/tune-up, engine overhauls and transmission overhauls. Profit potential lies in getting high volume because the majority of undercar services can be performed reliably on a routine basis. Undercar specialists can estimate accurately how long it will take them to replace brake pads or tail pipes. And comebacks will be rare.

At Allied Signal Inc's Aftermarket Group, E. Providence, RI, Paul Corkins, vice president, marketing, Brake Division, says, "The market for brake hard parts is increasing at 3% per year and the market for brake friction parts is increasing at 3.5% to 4.5% per year. That's real growth: units." Brake service is attracting market entrants for a variety of reasons. "Tire dealers have a need for additional revenue because radial tires last so long that unit sales growth is slow now. The same with muffler specialists. They are interested in other lines because exhaust systems last longer."

Pricing Strategies

Is increasing competition having an adverse effect on profit margins? Yes, those retailers who are offering "magic number" prices are undoubtedly hurting their own profit margins. But, interestingly, some retailers find that they are able to ignore competition and obtain prices which yield them gross margins of 60-65%.

In the brake service category, the 1991 magic number appears to be $59.95 per axle. For that price shops will change pads, inspect and fill the hydraulic system, resurface rotors or drums, and inspect calipers. But it is not necessary to meet that price to compete. Consumers appear to take into consideration other factors such as the guarantee on parts and workmanship, replacement of old hardware etc.

At Brakes Etc., Jeffersonville, PA, founder and president Dan Rhode, says, "We advertise a brake job at $79.95 per axle. That is a good price. It includes replacement with Bendix pads, with a limited lifetime warranty, resurfacing of rotors or drums, fill up of brake fluid, checking of calipers and a test drive. If semi-metallic pads are required the price

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"We have competitors who advertise $59.95 per axle. They do this by using private brand pads that have only a 90-day warranty. But $59.95 is just a low ball price. When the customer comes in, the shop tries to step him up to a higher priced job. In fact, the job may wind up costing much more because the crew is told to find work: replace calipers whether worn or not, sell a brake job for the second axle, and so on. Practices in this industry vary a lot depending upon the philosophies of the owners. We don't believe in low balling or pushing unnecessary work. We pull all four wheels and inspect all brakes but we only replace what is needed."

Corkins says, "A realistic price on a two-axle brake job is $175-$200. A price of $59.95 for a front axle job is realistic if only the pads have to be replaced, and that's rare. Most conscientious installers will replace the hardware whether they look worn or not because springs get fatigued with age. And often there is a need to resurface rotors or replace hydraulic parts like wheel cylinders."

In upstate New York, Joe DePaolis, president of the Johnny Antonelli Tire Chain, says, "We are surrounded by tough competitors on brake jobs. Here are ads for two shops advertising brake jobs at $59.95, K mart at $67, Western Auto at $59.95, and Sears at $48.00. Hurt their profit margins? It's bound to! We charge $89.95 for an 8-point brake job, warranted for 20,000 miles and $109.95 for a 10-point brake job with a 50,000 mile warranty."

Training A Concern

Despite significantly higher prices, DePaolis said sales of brake services are up 6.5% over last year. One of the worries DePaolis has about undercar service business is that it is getting harder to find good technicians and apprentices. "The work is getting more complex and the vocational schools are still the dumping ground for the school system." Are parts manufacturers helpful on training? "Not as much as they used to be. They have cut way back on clinics."

At Brake Parts Inc., McHenry, IL, Tim Golden, director of training, says, "Our company hasn't cut back, we just can't keep up with the demand. The two most wanted types of training are electronic engine control and anti-lock brakes. We are busy training 85 salesmen (85% are ASE certified) to hold ABS clinics for NAPA. In addition, we are training 120 Raybestos salesmen. They too, hold introductory clinics. We supplement that with videotapes and training manuals. Our staff of seven trainers also conducts clinics for large audiences, one hundred and up. There is a severe shortage of qualified technicians and the problem is worsening because of the increasing use of electronics. Now we are seeing electronically controlled suspensions as well as brake systems and engine controls."

Which suggests that there will be a shake-out of service retailers. The survivors will be those who know how to find, train and retain capable technicians. ■

RETAILERS

Champion Chooses Service; Buys Crown Auto

Two years ago, four chains battled for market supremacy in the Minneapolis-St. Paul area: Big Wheel, Champion, Crown (owned by Northern Automotive, Phoenix), and 10,000 Auto Parts. Now, following Champion's acquisition of Crown, there are only Champion and Big Wheel left. Champion acquired 18 stores from the bankrupt 10,000 Auto Parts in April, 1990.

"The chips fall in mysterious ways," Champion executive vice president Dene Billbe told us. "Northern was desirious of divesting Crown and we were looking for stores with service bays."

In October, 1990, Champion bought 11 of the Crown stores from Northern. This year, the company purchased 17 additional stores in Minnesota and Wisconsin. According to Northern Automotive sources, the remaining 30 Crown stores will be closed.

Billbe said changing demographics spurred the chain's move to service. "The do-it-for me revolution is going to come to the forefront," he said. "So we want both formats. It's not that there's not going to be any DIY, but we want to be able to take care of both. Running service bays is complex. That's the reason most people don't want to get into the business. You have to hire mechanics, you have problems with misdiagnosis. But since we're basically a franchisor with on-site supervisors, we can take more chances than a vertical operation can. All new corporate Champions will open with service bays and many franchisors may open with service bays if they want service bays."

Champion plans about 15-20 new franchise operations a year and temporarily,

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Tracking The Light TRUCK MAINTAINER

Last year, for the first time, we looked specifically at light truck, van, and sports utility vehicle DIYers. This year we broadened the scope to look at all those who were responsible for maintaining these vehicles—DIYer and non-DIYer alike.

by **Phil Katcher,** Business Editor

The market made up of people responsible for maintaining light trucks, vans, and sports utility vehicles is a *big* market. When Chilton Research Services, Radnor, PA, telephoned across the country to find out the habits of all vehicle maintainers (the results being published in last March's *Automotive Marketing*), it also screened for vehicle type. In all, it found that 26% of households in the U.S. had a light truck in them; 11% had a van; and 6% had a sports utility vehicle.

For the purpose of reading ease, hereafter, we'll refer to the light truck, van, and sport utility vehicle market as simply the "light truck market."

Beyond the sheer number of maintainers of these vehicles, however, they make up a good market because proportionally more of them spend time on automotive DIY jobs than do car maintainers. In all, 77% of all vehicle maintainers—maintainers of cars, light trucks, vans, and sport utility vehicles—define themselves as some sort of automotive DIYer. However, when the car maintainers are eliminated, the percentage of vehicle maintainers who call themselves DIYers leaps 10% to a total of 87%.

And, light truck DIYers are more serious about what they do than general vehicle DIYers. In all 31% of light truck DIYers called themselves "dedicated" DIYers, compared to 17% of all vehicle DIYers who defined themselves with the same term. Another 31% of light truck DIYers said they were "medium" DIYers, compared to 26% of all vehicle DIYers. On the other hand, 35% of all vehicle maintainers admitted they were only "light" DIYers, while only a quarter of light truck DIYers said that's how they defined themselves.

This may be in part because light truck owners usually have more than one vehicle to maintain. In only 6% of all U.S. households, light trucks are the only vehicle owned, while 2% of all U.S. households own only a van. Only 0.3% of all U.S. households have only a sports utility vehicle.

Comparing DIYers

Regardless of the reason, light truck DIYers enjoy doing it themselves more than all vehicle DIYers. In all, almost a quarter (24%) of light truck DIYers enjoy automotive maintenance jobs "a lot." This compares to only 18% of all vehicle maintainers. On the other hand, 22% of all vehicle maintainers don't enjoy automotive DIY at all, while only 17% of light truck DIYers said the same.

Light truck maintainers also tend to visit auto parts stores more than all vehicle maintainers. In all, 30% of light truck maintainers report they bought automotive parts, chemicals, and accessories in an auto parts store over the past year, while only 26% of all vehicle maintainers said the same. Discount stores were more patronized by light truck maintainers than all vehicle maintainers (37% vs 28%). So were department stores (33% vs 22%). In fact, light truck maintainers bought auto parts at every type of outlet in greater numbers than did all vehicle maintainers.

Light TRUCK STUDY

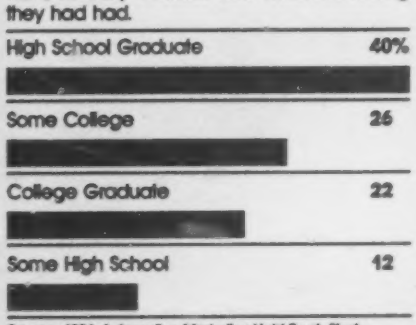
Light truck maintainers shop for auto supplies more often than all vehicle maintainers. In all, 10% say they shopped monthly for these products, compared to only 6% of all vehicle maintainers. Indeed, 8% said they shopped over 30 times a year, while only 5% of all vehicle maintainers shopped this often.

On the other hand, the educational level of light truck maintainers is somewhat lower than found among all vehicle maintainers. Among all vehicle maintainers, 46% had a high school diploma or at least some high school education. Among light truck maintainers, this figure jumps to 52%, for a 6% increase.

It's not surprising, then, that 17% are employed as craftsmen and kindred workers, compared to 10% of all vehicle maintainers who have the same sort of jobs. On the other hand, 16% of all vehi-

EDUCATION OF LIGHT TRUCK MAINTAINERS

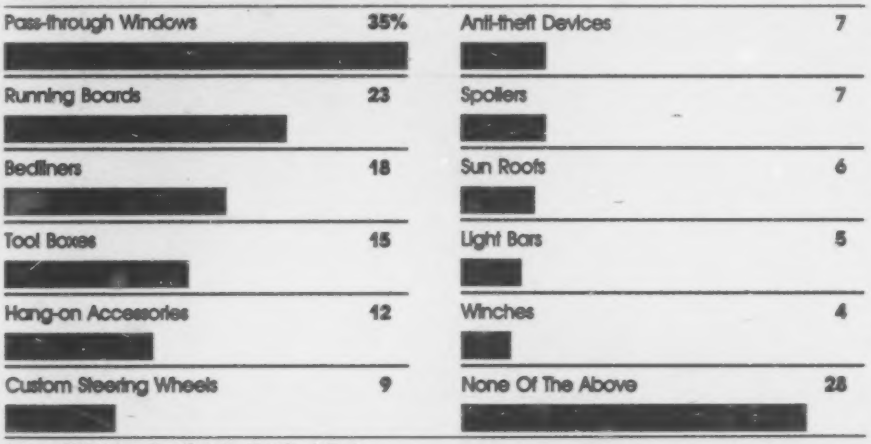
We asked those who maintained light trucks, vans, or utility vehicles how much schooling they had had.



Source: 1991 *Automotive Marketing* Light Truck Study

PRODUCTS ON LIGHT TRUCK MAINTAINERS VEHICLES

We asked those who maintained light trucks, vans, or utility vehicles what products they had on their vehicles.



Source: 1991 *Automotive Marketing* Light Truck Study

WHERE THEY BOUGHT RUNNING BOARDS

Auto parts store	33%
Dealer	15
Specialty installer	13
Farm store	10
Discount store	7

WHO INSTALLED RUNNING BOARDS

DIY installed	51%
Professionally installed	49

OE OR AFTERMARKET?

We asked light truck maintainers if their running boards came with the truck or they added it after buying the truck.

Already on	70%
Bought	30
Don't know	0

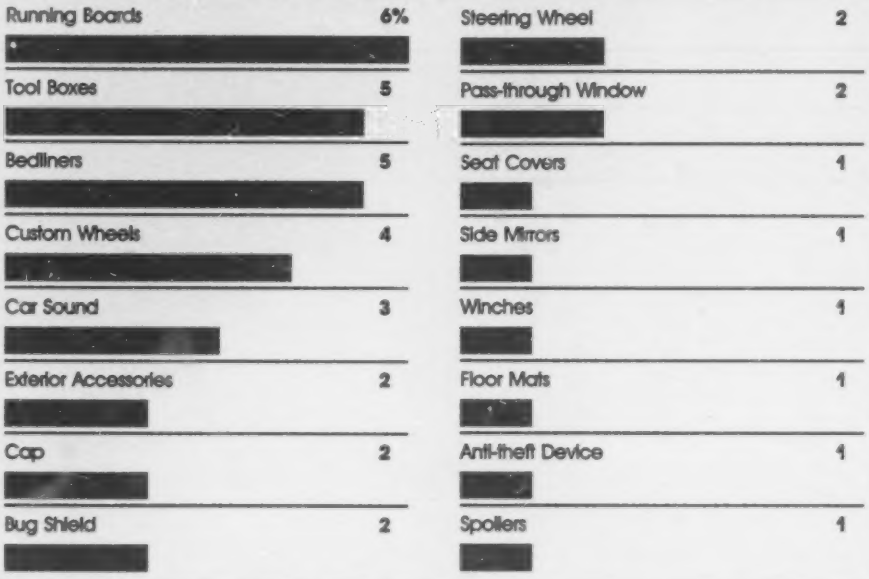
Light TRUCK STUDY

cle maintainers are professonal, technical or kindred workers. Light truck maintainers in these types of jobs make up 14% of the vehicle maintainer universe.

On the other hand, light truck maintainers, regardless of educational levels or

WHAT PRODUCTS THEY BOUGHT FIRST

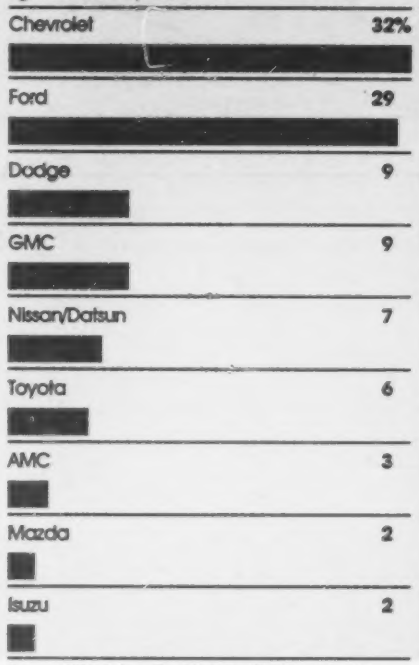
We asked those who maintained light trucks, vans, or utility vehicles what the first aftermarket product they bought for their vehicle was.



Source: 1991 *Automotive Marketing* Light Truck Study

TRUCKS LIGHT TRUCK MAINTAINERS OWN

We asked those who maintained light trucks, vans, or utility vehicles what specific brands of light trucks they own.

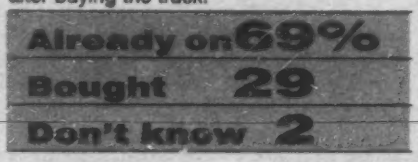


Source: 1991 *Automotive Marketing* Light Truck Study

BEDLINERS

OE OR AFTERMARKET?

We asked light truck maintainers if their bedliner came with the truck or they added it after buying the truck.



Almost a third of those who installed bedliners in their light truck, van, or utility vehicle purchased them after buying the vehicle.

Auto parts stores were the single most popular place for those who purchased bedliners to shop for them. However, a much larger proportion of women light truck maintainers, at 66%, bought bedliners at auto parts stores than did men, at 23%. The remaining third of women bought their bedliners at their dealers, while men divided their purchases among such places as truck and RV stores, specialty shops, discount and department stores, and performance shops.

As well, almost three quarters (73%) of light truck maintainers with annual household incomes of under than $20,000 bought bedliners at auto parts stores. However, only 17% of those with annual household incomes over $40,000 bought their bedliners at auto parts stores. Just over a third of the latter income group patronized their dealers or shopped at places such as specialty repair shops or department and discount stores.

In all, women light truck maintainers who had bedliners installed were almost evenly divided in having them installed by themselves (30%), by the dealer (33%), or by a friend or relative (36%). But men differed, with just over half (52%) having them installed by someone other than themselves. Just over a quarter went to the dealer—none had a friend or relative do the job—while others had them installed by an auto parts store (11%) or a specialty shop (10%).

All the women who installed their own bedliners said they did it because it was an easy job to do. Almost half (49%) of the men gave the same reason, but 30% of the men did it to save money. Another 22% said they simply could do the job, while 13% did it to save time.

As well, all the women light truck maintainers who installed their own bedliners said that they'd be "somewhat" likely to do the job again. Men were more positive, with 91% said they'd be "very" likely to do the job again, and only 9% said it was "not at all" likely that they'd put their own bedliners in again.

The bottom of the line tool boxes were bought by men between 35 and 44 years old making over $40,000 annually who spend less than an hour a month on automotive DIY but are responsible for maintaining three or more vehicles.

Finally, women light truck maintainers were slightly better informed bedliner purchasers, with two thirds shopping around before buying what they did, while only just over half (53%) of the men doing the same. ■

WHERE THEY BOUGHT BEDLINERS

Most truck maintainers who bought bedliners bought them at auto parts stores.

WHO INSTALLED BEDLINERS

Just over half of those who bought bedliners had them professionally installed.

Light TRUCK STUDY

LIGHT BARS

All those who purchased light bars from an aftermarket source, rather than getting them on their light truck, van, or utility vehicle as OE, were male. They fell into two age groups, 25 to 34 and 45 to 54. Their annual household incomes were in two ranges, $20,000 to $30,000 and over $40,000. Around half spent over 11 hours a month on automotive DIY, while the rest spent five or fewer. And, all were responsible for maintaining two or more vehicles.

Basically, those who bought light bars went to one of only two sources, an auto parts store or a performance or speed shop. Younger buyers went to performance shops, while both age groups went to auto parts stores. Buyers in the lower income bracket also bought at speed shops, while all light bar buyers in the upper income bracket patronized auto parts stores.

All the serious DIYers who bought light bars bought them at speed shops.

Light bars purchased after the light truck has been bought are virtually always a DIY-installation project. Just over three quarters of all light bar buyers installed their own light bar. But, the remaining quarter were installed by a friend or relative of the purchaser.

While some two thirds installed their own light bars to save money, the rest of the light bar DIYers said they did the job for "personal enjoyment or satisfaction," because it was "simple or easy to do," or simply because the DIYer could do the job himself.

Those who installed their own light bars to save money all spent 11 or more hours a month on automotive DIY. Yet, they were equally found in the younger and older age group and upper and lower income levels.

Would they do it again? You bet. Every light bar installer told us that he'd be "very likely" to install another light bar if he got the chance.

What do they buy? Every light bar purchaser told us that he bought the best product available. Even so, slightly over three quarters said they didn't shop around before buying the light bar they did.

Those who did shop around were in the 25 to 34-year-old group, making between $20,000 and $30,000 in annual household income, spending 11 or more hours a month on automotive DIY, and responsible for maintaining two vehicles. ■

OE OR AFTERMARKET?

We asked light truck maintainers if their light bar came with the truck or they added it after buying the truck.

Already on	81%
Bought	19
Don't know	0

WHERE THEY BOUGHT LIGHT BARS

Most truck maintainers who bought light bars bought them at auto parts stores.

Auto parts store	76%
Performance shop	24

WHO INSTALLED LIGHT BARS

Three quarters of those who bought light bars installed them themselves.

DIY installed	76%
Professionally installed	24

ANTI—THEFT DEVICES

Although over half of those who have anti-theft devices for their light truck, van, or utility vehicle bought them with the vehicle, an impressive 44% bought aftermarket models.

Exactly half of those who bought anti-theft devices bought them for a light duty truck. Another third bought such a device for a van, while 16% bought a device for a utility vehicle.

Many anti-theft devices include fairly complicated electronic components. It's no surprise, then, that over half (58%) of those who bought aftermarket devices had them installed at the specialty dealer from whom they bought the device. Another 10% had them installed at the dealer, while 8% each had them installed at an auto parts store and by a friend or relative.

Of the 17% who installed their own anti-theft devices, all were male. Over half (52%) were aged between 45 and 54 years of age. All made over $40,000 in annual household incomes—showing that the job was a pleasure since they could presumably afford to have had the devices installed professionally. And, indeed, over half (52%) report that they habitually spend 11 or more hours a month on automotive DIY work. And, they said they installed the device since they enjoyed doing it, as well as to make sure the job was done right. Finally, the same percent was responsible for just one vehicle, the light truck, van, or utility vehicle they bought the device for.

Everyone who installed their own anti-theft device also said that they'd be "very likely" to do the job again.

Yet, there is an interesting suggestion that people who buy anti-theft devices buy them as impulse items, expensive though many of them are. In all, well over half (60%) said they didn't bother to shop around for the best price for the unit they bought. Even so, almost the same percent (68%) said they bought the "top of the line" device, in terms of quality. The others said they bought the "middle of the line," while nobody admitted to buying a low quality anti-theft device.

Of those who bought the middle range quality devices, over half (53%) made $30,000 or less in annual household income; all spent five or fewer hours on automotive DIY a month; and all were aged between 25 and 44 years of age. ■

OE OR AFTERMARKET?

We asked light truck maintainers if their anti-theft device came with the truck or they added it after buying the truck.

Already on	56%
Bought	44
Don't know	0

WHERE THEY BOUGHT ANTI-THEFT DEVICES

Most truck maintainers who bought anti-theft devices bought them at auto parts stores.

Auto parts store	23%
Dealership	19
Audio retailer	10
Hardware store	9
Specialty installer	8

WHO INSTALLED ANTI-THEFT DEVICES

A large majority of those who bought anti-theft devices had them professionally installed.

Professionally installed	83%
DIY installed	17

Light TRUCK STUDY

TOOL BOXES

In all, 15% of light truck, van, or utility vehicle drivers have a tool box on their vehicle. Almost half of those vehicle maintainers bought their tool box as an add-on accessory. Interestingly, those who added the tool box some time after buying the vehicle tended to be younger. In all, 20% of those who bought tool boxes were under 25-years-old; 34% were 25 to 34-years-old; 27% were 35 to 44-years-old; 17% were 45 to 54-years-old; and only 3% were over 55 years old.

As well, as annual household incomes rose, the percentage of those who bought a tool box later compared to those who bought a vehicle so equipped also declined—until the high end of the income spectrum. Almost a quarter (24%) of those making under $20,000 bought a tool box, a percentage that drops to 15% of those making between $20,000 and $30,000. However, there is a slight rise, to 16%, among those buying a tool box who made annual household incomes of between $30,000 and $40,000. Then, 42% of those making over $40,000 annually were aftermarket tool box buyers.

Certain groups of light truck maintainers who bought tool boxes did *not* buy them at auto parts stores. For example, not a single tool box buyer under 25 years of age, nor any tool box buyers who made between $20,000 and $30,000 in annual household income, nor any tool box buyers who spend six or more hours a month in automotive DIY bought their box at an auto parts store.

This latter fact is especially worrisome to auto parts chain stores, since the DIYer who spends over six hours a month on his vehicle should be the best auto parts store customer. In fact, at least when buying tool boxes for a light truck, van, or utility vehicle, these serious DIYers mostly like to shop at department and discount stores. A handful buy them at independent garages, hardware stores, and WDs.

All the people who bought tool boxes with whom we spoke had them installed by a DIYer, either themself or by a friend or relative. Light DIYers, who spend five or fewer hours a month on automotive DIY, and those making over $40,000 in annual household income, turned the job over to another DIYer; the rest did it themselves.

Almost everyone who installed his own tool box said he'd do it again. Among those who wouldn't be very likely to were those at either end of the age and income ranges and those spending between six and ten hours a month on automotive DIY.

Among those who shopped around for the best tool box were all the women and all those spending 11 or more hours a month on automotive DIY. Light truck maintainers over 55-years-old bought without comparison shopping. ■

OE OR AFTERMARKET?

We asked light truck maintainers if their tool box came with the truck or they added it after buying the truck.

Already on	51%
Bought	49
Don't know	0

WHERE THEY BOUGHT TOOL BOXES

A fifth of truck maintainers who bought tool boxes bought them at auto parts stores.

Auto parts store	19%
Department store	16
Discount store	14
Hardware store	6
Dealer	4

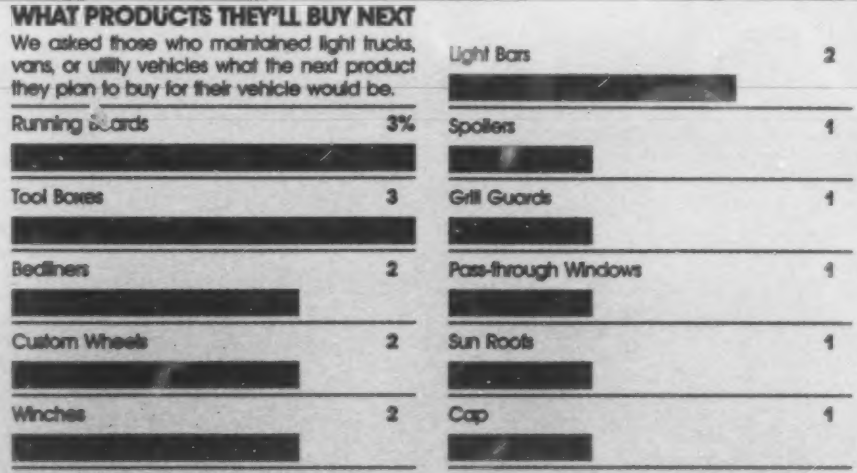
WHO INSTALLED TOOL BOXES

Most of those who bought tool boxes installed them themselves.

DIY installed	87%
Professionally installed	13

WHAT PRODUCTS THEY'LL BUY NEXT

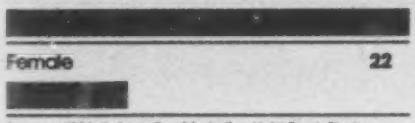
We asked those who maintained light trucks, vans, or utility vehicles what the next product they plan to buy for their vehicle would be.



Source: 1991 *Automotive Marketing* Light Truck Study

LIGHT TRUCK MAINTAINERS BY SEX

We noted what sex those who maintained light trucks, vans, or utility vehicles were.



Source: 1991 *Automotive Marketing* Light Truck Study

job descriptions, have slightly more money to throw around on their favorite vehicles than do all vehicle maintainers. In all, 31% of them have annual household incomes of $40,000 or more. This compares to all vehicle maintainers, of whom only 29% have annual household incomes in this range.

Light trucks, many vans, and sports utility vehicles, certainly, have a certain "macho" image. It's no surprise, then, that 78% of their maintainers are men. Among all vehicle maintainers, only 57% are men. ■

STUDY METHODOLOGY

The 1991 *Automotive Marketing Light Truck Maintainer Study* was conducted by Chilton Research Services, Radnor, PA, which interviewed 403 maintainers of light trucks, vans, and sports utility vehicles over the telephone. Questions were open ended to assure that the words used in the answers were the interviewee's own. This study cannot be compared to the light truck study we produced last year, in which CRS interviewed 306 DIYers who owned light trucks since this year all maintainers were interviewed, even if they did no automotive DIY work themselves. ■